choose and book

NHS

End User Manual for Information Analysts for Choose and Book R2.1

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Choose and Book Programme

End User Manual
Information Analysts
Choose and Book R2.1

Welcome to the End User Manual for Information Analysts for Choose and Book R2.1

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1 Background to Choose and Book

Choose and Book is the nationally commissioned system built by Atos Origin to provide the NHS with an electronic booking and choice tool. Choose and Book first went live in 2004, then in June 2005 Release 2.0 of Choose and Book went live followed by an update to R2.1 in July 2005.

This end user manual sets out the functions that an Information Analyst can perform in R2.1 Choose and Book. There are 5 types of Information Analyst for 5 different types of organisation:

- Information Analyst for a Service Provider Organisation (SPO)
- Information Analyst for a Primary Care Trust (PCT)
- Information Analyst for a Strategic Health Authority (SHA)
- Information Analyst for the Booking Management Service (BMS)
- Information Analyst for the Practice

Which type of Information Analyst you are, determines which reports, enquiries and extracts you have access to.

The Information Analyst roles have access to reports, enquiries and extracts. This manual sets out how the Information Analyst can access each of these.

2 Accessing Choose and Book with your Smartcard

A Smartcard looks much like a credit card, with a picture of the user, together with their Unique Identification number (UID) and a gold chip where all the information is held.

⇒ To access Choose and Book, you should already be logged on to your computer, so you see your desktop on your screen

⇒ Put your smartcard into the smartcard reader

⇒ The Gem Authenticate box appears

⇒ Type in your PIN number (also called Pass Code) and click on OK or press return on the keyboard

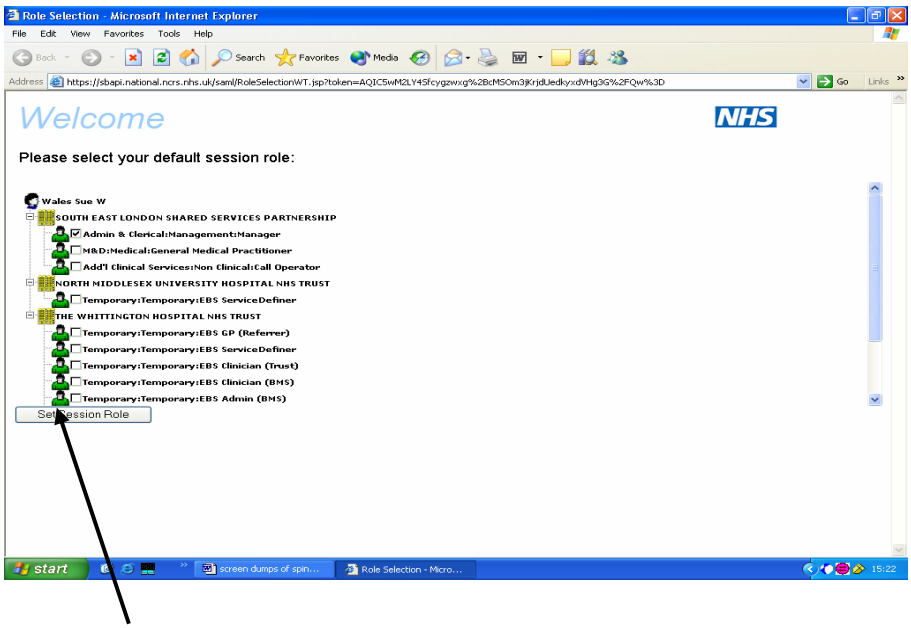
⇒ You may *(or may not)* now see a security alert.

Security Alert
Information you exchange with this site cannot be viewed or changed by others. However, there is a problem with the site's security certificate.
The security certificate was issued by a company you have not chosen to trust. View the certificate to determine whether you want to trust the certifying authority.
The security certificate date is valid.
The security certificate has a valid name matching the name of the page you are trying to view.
Do you want to proceed?
Yes
No
View Certificate

⇒ Click Yes to proceed

⇒ You may have to wait a few seconds, but you then see a screen saying '**Welcome**' with the role(s) you have been allocated on the Spine.

⇒ Click in the box next to the role you wish to use for this session so there is a tick in the box next to that role.



⇒ Click on Set Session Role

⇒ Now the system asks if you want to close the present window. Click on Yes

Microsoft Internet Explorer
The Web page you are viewing is trying to close the window.
Do you want to close this window?
Yes
No

⇒ You are now returned to your desktop, having successfully logged on to the Spine.

2.1. If you have a Choose and Book icon on your desktop:

⇒ Double-click on the Choose and Book icon on the desktop to launch Choose and Book

⇒ Choose and Book sometimes takes a little while to check your authentication

⇒ If you have more than one Choose and Book business function you will open to the Choose and Book role selection screen

⇒ If you have only one Choose and Book business function, then you will be taken straight to your Choose and Book Homepage

⇒ You have now accessed Choose and Book using your smartcard

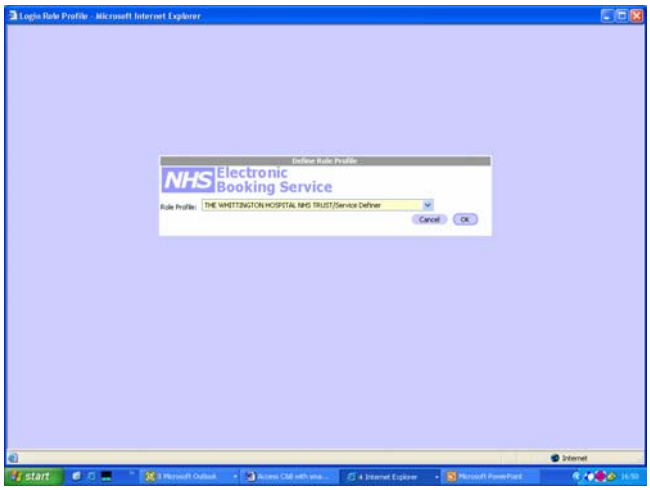
2.2. If you do NOT have a Choose and Book icon on your desktop:

⇒ Open Internet Explorer on your computer

⇒ In the address box of the internet screen, type in **https://nww.ebs.ncrs.nhs.uk/app-ebs**

⇒ Choose and Book sometimes takes a little while to check your authentication, and then the Choose and Book homepage will open showing you the Choose and Book business functions available to you if you have more than one business function, or to your homepage if you only have one business function.

⇒ You have now accessed Choose and Book using your smartcard



NB: Your Smartcard must remain in the smartcard reader for the whole time that you are using the system. If you pull your Smartcard out of the reader, your session will end.

2.3. Selecting your Role in Choose and Book

⇒ As an Information Analyst, within Choose and Book, you will have been given the role of "**Information Analyst**".

⇒ Select the appropriate **Information Analyst** role from the picklist and click OK

- Information Analyst SPO for Service Provider Organisation
- Information Analyst PCT for Primary Care Trust
- Information Analyst BMS for Booking Management Service
- Information Analyst SHA for Strategic Health Authority
- Information Analyst Practice

⇒ Choose and Book will now load your Homepage

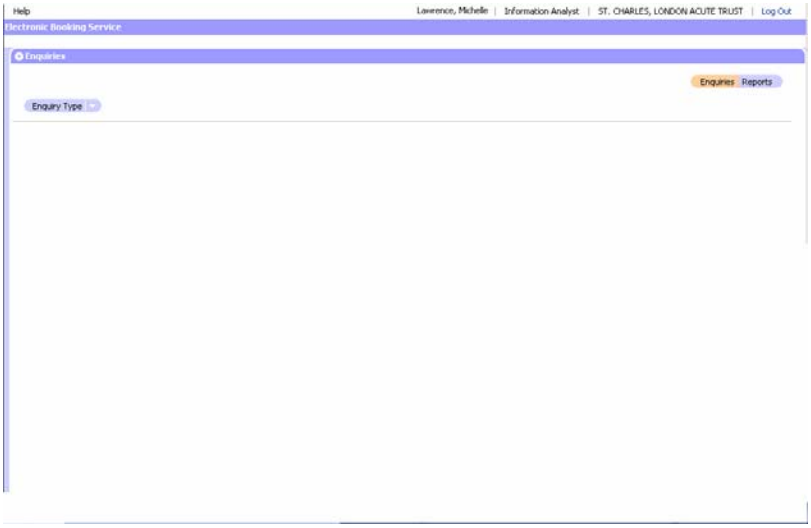
2.4. Logging out of and Closing Choose and Book

⇒ To log out of Choose and Book you click on Log Out near the top right of the screen

⇒ This takes you back to the selecting role screen, so if required, you can select another Choose and Book role, and go back in to the tool from here.

⇒ To exit Choose and Book completely, you need to click on the at the top right corner of the screen.

2.5. Your Homepage



⇒ Your homepage has only two key areas: **Enquiries** and **Reports** (Extracts are accessed via the Reports section)

3 How to Run an Enquiry

An Enquiry is a set of data for a period of time specified by the information Analyst. The data is collected when the enquiry is run i.e. is up to date.

3.1. What Enquiries can Each Information Analyst Role Run?

Type of Information Analyst	What Enquiries they can run
Service Provider Organisation (SPO)	• SCE01 Two Week Wait Breaches • SCE05 Missing Referral Letter • SCE06 Appointment Enquiry • SCE08 Service Directory
Primary Care Trust (PCT)	• SCE01 Two Week Wait Breaches • SCE05 Missing Referral Letter • SCE06 Appointment Enquiry • SCE08 Service Directory
Strategic health Authority (SHA)	• None
Booking Management Service (BMS)	• None
Practice	• None

3.2. What Does Each Enquiry Contain?

Report	Contents
Appointment Enquiry	You can view the booked appointments to your service, including showing which referral letters have been updated since they have been reviewed.
Missing Referral Letters	Shows you which booked appointments have not had a referral letter sent by the Lead Time. This enquiry gives you the contact details of the referrer, so you can contact them to chase up the missing referral letter.
Service Directory	This shows you what services have been published for your organisation in the Directory of services (DOS)
Two Week Wait Breaches	Shows you what appointments have breached the 2 week wait time

3.3. How to Run an Appointment Enquiry

This enquiry tells you to view all booked appointments to your service, and tells you which referral letters have been updated since they were last reviewed.

⇒ Click Enquiries on the right side of the screen

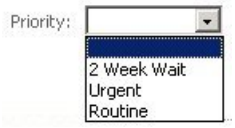
⇒ Click Enquiry Type and select **Appointment Enquiry**

NB: The yellow fields are mandatory

⇒ Enter the **Start Date** and **End Date** for the enquiry you wish to run

NB: you must keep it within a range of 28 days maximum)

⇒ To filter the contents of the enquiry, you can select the **Priority** of the types of booked appointments you wish to view.

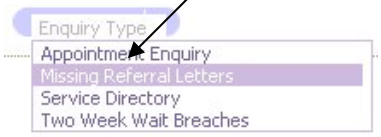


⇒ Click Search

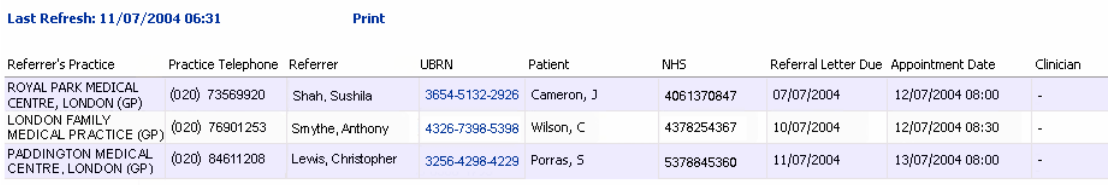
3.4. How to Run a Missing Referral Letters Enquiry

⇒ Click Enquiries on the right side of the screen.

⇒ Click Enquiry Type and select **Missing Referral Letters**.



⇒ Click Search



Last Refresh: 11/07/2004 06:31 Print

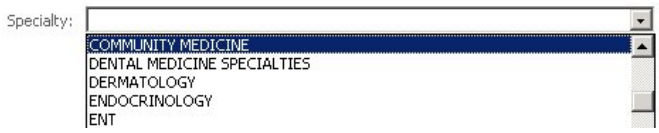
Referrer's Practice	Practice Telephone	Referrer	UBRN	Patient	NHS	Referral Letter Due	Appointment Date	Clinician
ROYAL PARK MEDICAL CENTRE, LONDON (GP)	(020) 73569920	Shah, Sushila	3654-5132-2926	Cameron, J	4061370847	07/07/2004	12/07/2004 08:00	-
LONDON FAMILY MEDICAL PRACTICE (GP)	(020) 76901253	Smythe, Anthony	4326-7398-5398	Wilson, C	4378254367	10/07/2004	12/07/2004 08:30	-
PADDINGTON MEDICAL CENTRE, LONDON (GP)	(020) 84611208	Lewis, Christopher	3256-4298-4229	Porras, S	5378845360	11/07/2004	13/07/2004 08:00	-

3.5. How to Run a Service Directory Enquiry

⇒ Click Enquiries on the right side of the screen.

⇒ Click Enquiry Type and select **Service Directory**

⇒ If can filter the content of your enquiry selecting a **Specialty**



⇒ You may also wish to filter the enquiry content by **Commissioning PCT**. To search for the name of a commissioning PCT, click the Ellipsis button and select the PCT you wish to see the enquiry for.

⇒ Click Search

3.6. How to Run a Two Week Wait Breaches Enquiry

⇒ Click Enquiries on the right side of the screen.

⇒ Click Enquiry Type and select **Two Week Wait Breaches**.

⇒ Click Search

3.7. Printing Enquiries

⇒ Once you have selected an enquiry, you may print it by clicking **Print**

⇒ The windows print dialogue box displays

⇒ Select the printer you wish to send the Enquiry to and the number of copies you want, then click Print

4 How to Run Reports

A report is a predefined list of data for a predefined date period (for example, a monthly report for a set period on what referrals a practice has made). Report data is generated either weekly or monthly and therefore will not necessarily be up to the minute.

4.1. What Reports Can Each Information Analyst Role Run?

Type of Information Analyst	What Reports they can run
Service Provider Organisation (SPO)	• SPR04 Service Referral Analysis • SPR07 Referral Analysis • SPR09 Past Slot Utilisation • SPR10 Future Slot Utilisation • SPR11 Service Activity
Primary Care Trust (PCT)	• SPR04 Service Referral Analysis • SPR07 Referral Analysis • SPR09 Past Slot Utilisation • SPR10 Future Slot Utilisation • SPR11 Service Activity • COR02 Practice Summary Report • COR03 Referral Analysis • COR05 Commissioned Services • COR08 Future Slot Utilisation
Strategic health Authority (SHA)	• None
Booking Management Service (BMS)	• None
Practice	• None

4.2. What Does Each Report Contain?

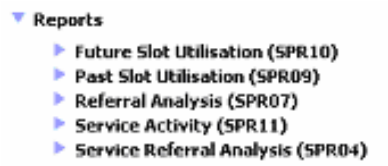
Report	Contents
Service Referral Analysis	Provides an overview of the timeliness with which services respond to referrals received for appointments within that time period.
Referral Analysis	Statistics for types and number of referrals made, types of appointments and rejected referrals
Past Slot Utilisation	Shows information on bookings and unused slots for all Services in the provider organisation. Its purpose is to provide a retrospective view of services to analyse bookings and unused slots.
Future Slot utilisation (SPO)	Shows information on bookings and unused slots for all Services in the Provider for the next 13 weeks. Its purpose is to ensure slots that are being published, are being used by Choose and Book, and there is spare capacity

Future Slot Utilisation (PCT)	Shows information on bookings and unused slots for all Services commissioned by the PCT for 13 weeks into the future. Its purpose is to provide a future comparison of Specialties between Providers to analyse booking and unused slots to ensure enough slots are being published.
Service Activity	Provides an overview of the activity in each Service provided by a provider trust.
Practice Summary Report	Provides an overview of activity for each Practice in the PCT by Specialty.
Referral Analysis	Provides data on the Appointment Requests and Referral rejections for each Practice in the PCT.
Commissioned Services	Monthly summary of currently commissioned services grouped by Speciality and Service.

4.3. How to Run a Report

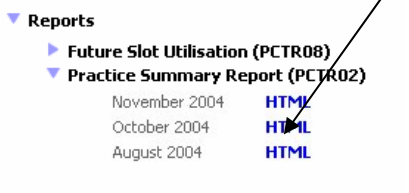
⇒ Click Reports on the top right of the homepage.

⇒ Click the **Reports** link to show the list of reports available to you



⇒ Click the report you wish to view, to display a list of those reports by date.

⇒ Select the report for the date you require by clicking the HTML link next to the report



⇒ You now see the report you have selected.

⇒ Below shows an example of the Future Slot Utilisation report.

ST. CHARLES, LONDON ACUTE TRUST

Future Slot Utilisation - as at 07/08/2004

Specialty: GENERAL MEDICINE

		Week Ended 07-Aug	14-Aug	21-Aug	28-Aug	04-Sep	11-Sep	18-Sep	25-Sep	02-Oct	09-Oct	16-Oct	23-Oct	30-Oct
Edgware Service														
2 Week Wait	Slots made available	0	0	0	0	0	0	0	0	0	0	0	0	0
	Appts booked via EBS	0	0	0	0	0	0	0	0	0	0	0	0	0
	Unused Slots	0	0	0	0	0	0	0	0	0	0	0	0	0
	% Slots Used	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Urgent	Slots made available	0	0	0	0	0	0	0	0	0	0	0	0	0
	Appts booked via EBS	0	0	0	0	0	0	0	0	0	0	0	0	0
	Unused Slots	0	0	0	0	0	0	0	0	0	0	0	0	0
	% Slots Used	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Routine	Slots made available	70	70	70	70	70	70	70	20	0	0	0	0	0
	Appts booked via EBS	0	0	0	0	0	0	0	0	0	0	0	0	0
	Unused Slots	70	70	70	70	70	70	70	20	0	0	0	0	0

⇒ You can print the report by clicking on **Print** on the taskbar at the top left of the screen

5 How to Run an Extract

An Extract is a set of data in a CSV Format file that can be downloaded and extracted into your local database. Extracts are generated automatically every month, much like reports, for a set period of time.

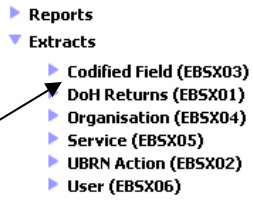
5.1. What Extract Can Each Information Analyst Role Run?

Type of Information Analyst	What Extracts they can run
Service Provider Organisation (SPO)	• EBSX01: DoH Returns (for Acute Care Trusts) • EBSX02: UBRN Action • EBSX03: Codified Field • EBSX04: Organisation • EBSX05: Service • EBSX06: User • EBSX08: Role Profile
Primary Care Trust (PCT)	• EBSX01: DoH Returns (for Acute Care Trusts) • EBSX02: UBRN Action • EBSX03: Codified Field • EBSX04: Organisation • EBSX05: Service • EBSX06: User • EBSX08: Role Profile
Strategic health Authority (SHA)	• EBSX02: UBRN Action • EBSX03: Codified Field • EBSX04: Organisation • EBSX05: Service • EBSX06: User • EBSX08: Role Profile
Booking Management Service (BMS)	• BMSX03: BMS Transaction • EBSX08: Role Profile
Practice	• EBSX08: Role Profile

5.2. How to Open an Extract

⇒ Click Reports

⇒ Click Extracts to show the list of extracts available to download (according to your type of Information Analyst).



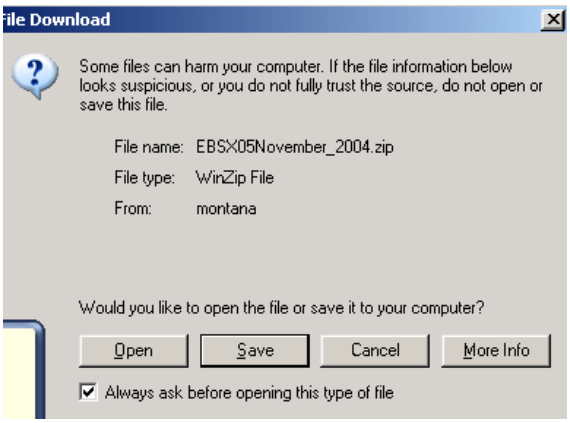
⇒ Click the link to the extract you wish to download to display a list of those extracts by date.

⇒ To download an extract in CSV format, click the **CSV** link next to the extract.

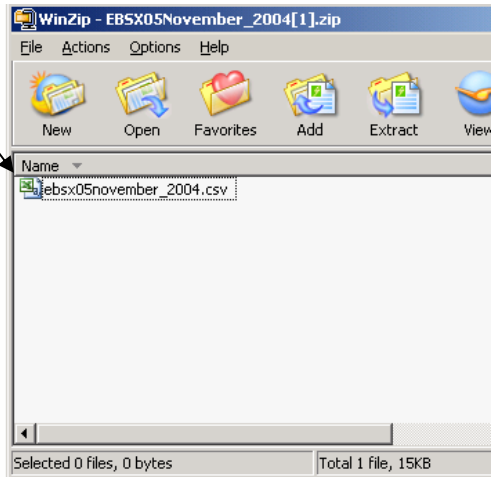
	A	B	C	D
1	ROLE_PROFILE_CODE	PRACTITIONER_CODE	JOB_ROLE_CODE	ORG_CODE
2	100000015	80000015	S0010:G0020:R0050	CABBMS1
3	100000016	80000016	S0010:G0020:R0050	CABSPO1
4	100000017	80000017	S0010:G0020:R0050	CABSPO1
5	100000018	80000018	S0030:G0100:R0620	CABSPO1
6	100000019	80000019	S0040:G0140:R1070	CABSPO1
7	100000020	80000020	S0040:G0140:R1070	CABSPO2

⇒ Above is a sample Role Profile Extract to Excel

⇒ You will now be asked if you want to open the file or save the extract to your computer.


File Download
Some files can harm your computer. If the file information below looks suspicious, or you do not fully trust the source, do not open or save this file.
File name: EBSX05November_2004.zip
File type: WinZip File
From: montana
Would you like to open the file or save it to your computer?
Open
Save
Cancel
More Info
Always ask before opening this type of file

⇒ If you click on **Open**, you will now see a WinZip box. Double click on the file of data you wish to open.



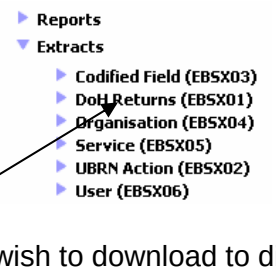
⇒ You will now see the extract of report data.

⇒ Click ✕ in the top right corner to close the extract report.

5.3. How to download an Extract

⇒ Click Reports

⇒ Click ▼ Extracts to show the list of extracts available to download (according to your type of Information Analyst).



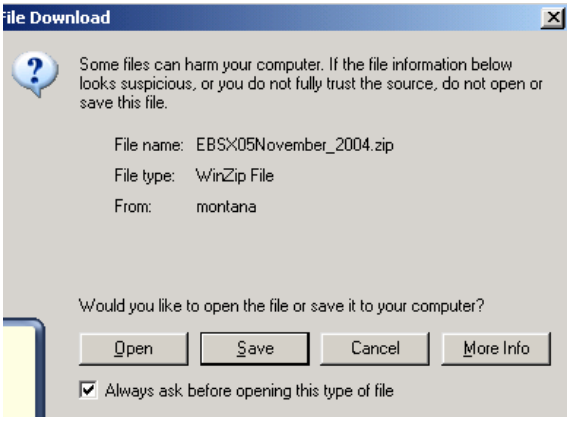
⇒ Click the link to the extract you wish to download to display a list of those extracts by date.

⇒ To download an extract in CSV format, click the **CSV** link next to the extract.

	A	B	C	D
1	ROLE_PROFILE_CODE	PRACTITIONER_CODE	JOB_ROLE_CODE	ORG_CODE
2	100000015	80000015	S0010:G0020:R0050	CABBMS1
3	100000016	80000016	S0010:G0020:R0050	CABSPO1
4	100000017	80000017	S0010:G0020:R0050	CABSPO1
5	100000018	80000018	S0030:G0100:R0620	CABSPO1
6	100000019	80000019	S0040:G0140:R1070	CABSPO1
7	100000020	80000020	S0040:G0140:R1070	CABSPO2

⇒ Above is a sample Role Profile Extract to Excel

⇒ You will now be asked if you want to open the file or save the extract to your computer.


File Download
Some files can harm your computer. If the file information below looks suspicious, or you do not fully trust the source, do not open or save this file.
File name: EBSX05November_2004.zip
File type: WinZip File
From: montana
Would you like to open the file or save it to your computer?
Open
Save
Cancel
More Info
Always ask before opening this type of file

⇒ If you wish to download the data and extract it into your own database, click Save

⇒ In the save box, state where you want the file to be saved and downloaded to.

⇒ Click Save